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"A Year in the Life. . ."

Team Lead Refresher Training

Outcomes for the Day

- Participants will leave the training better equipped to serve as team leads, including
  - Working with the state consultant assigned to the review
  - Establishing and maintaining good relationships with the institution
  - Building relationships with team members
  - Leading the review process

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Welcome

- Agenda
- Time frame for the day
- Restroom location
- Cell phone reminder

Roles and Responsibilities

- Roles
  - PSD Administrators
  - PSD Consultants
  - PSD Trainer Extraordinaire
  - Team Leads (veteran and new)
- Responsibilities
  - Actively participate
    - Share experiences appropriately
    - Practice during assigned times
  - Keep an open mind
    - Apply new knowledge to your "bag of tricks"

Now that I've said yes ….what's next?

- What are the tasks of a team lead?
- Which ones do you feel most capable of leading? (strength)
- Which ones do you feel least capable of leading? (growth area)
- Are you open to new approaches you might discover today?
- What questions do you have?

Network, network, network!

- Get to know your state consultant and how best to work with him/her
  - Is email or phone best to reach you?
  - Work times-early bird or night owl?
  - Who will be in charge of what?
- Talk to veteran team leads for tips
  - "How do you approach.........."
  - "What does it look like when you ......"
  - "Can you help me brainstorm how to....."
  - "Do you have a template that..........."

Job responsibilities

- List of Team Lead and Consultant Roles in CTC Site Visits (page 0 or Handout #3)
- Divided into three parts
    - Prior to the visit
    - During the Visit
    - Following the Visit
- Review its contents and identify questions you may have on a sticky note (one question per sticky note) and collect on a page of notebook paper, desk top, somewhere accessible

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Job Responsibilities Questions

- Today's session is framed around the information on this handout. Remove questions as they are answered and we will address any remaining ones at the end of the day (remote participants will be able to email them in to the trainers)
- Today's trainers and PSD administrators are also available at any time between today and your site visit should additional questions arise

Part 1: Prior to the Visit

Purposes of the Site Visit

- Confirm the findings of Program Assessment for each program sponsored
- Confirm/determine if any programs will have a detailed program review instead of program sampling
- Determine the findings for each Common Standard
- Arrive at an accreditation recommendation for the institution as a whole

What occurs before the Team Lead joins the review team?

- Institution selects site visit review dates
- CTC administration selects state consultant
- Year Out Phone Conference conducted
- Monthly communication between consultant and the institution has begun
- Possible work on documentation:
  - Pre Conditions
  - State consultant may review 1-2 Common Standards narrative for completeness

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Once the Team Lead is assigned, what occurs?

- State Consultant provides the Team Lead with background information gathered at the Year-Out Conference
- Consultant introduces the institution to the Team Lead via email
- CTC assembles the site visit team (ongoing work)
  - Expertise determines program sampling members
  - Common Standards members usually more broad-based

Initially Contacting the Team

- Team Lead sends email
  - Initial introduction, dates of the visit and welcome to the team
  - Introduce the Team Member Info Sheet
  - Verify program sampling members' assignments
  - Ask Common Standards members for their choice of standards to cover
  - Ask each team member to watch the webinar pertinent to their role on the team
  - Set the expectation of the team conference call two weeks prior to the visit
  - Let them know you will keep in contact with them on a regular basis

Practice Time!

- Take the next three minutes to begin your opening email to your team

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Subsequent Communications

- Determine specific assignments for Common Standards' members
- Reminder of pre-visit reading & writing responsibilities
- Check in on each members' progress in reading and reviewing
- Provide information on how to view the documents
- Set the conference call time frame and work with the state consultant to provide the team members with access information
- Logistical details handled by the state consultant
  - Transportation to review
  - Lodging reservations
  - Meal restrictions

Sample emails (page 1-8)

- Initial Email to the Team, including Conference Call instructions: Handout #2
- Documents posted: Handout #3
- Summary of the conference call issues: Handout #4
- Logistical details for Day 1: Handout #5

2 Month Out Pre-Visit to the Institution

- Work with consultant on setting the date and determining how you will attend (Skype, phone, in person)

- Preparation for the pre-visit
  - Familiarize yourself with the programs offered and program summaries
  - Continue working with the state consultant and the institution on the interview schedule

2 Month Out Pre-Visit to the Institution

- Establish a friendly working relationship with the institution's personnel
- Use the Checklist (page 9) as notes of the meeting
  - Consultant leads the discussion on
    - Logistics
    - Meal choices, including working lunches
    - Technology needs
    - Campus workroom needs
    - Schedule of days
    - Details on the responsibilities after the visit
  - Team Lead leads the discussion on
    - Document availability and organization
    - Schedule discussion

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Developing the Interview Schedule

- State Consultant begins discussion of the interview schedule at the Year-Out Conference and monthly check-ins
- The draft interview schedule is reviewed and revised at the two-month-out pre-visit
- Steps to developing the interview schedule
  - Structure of rows and columns
  - Preconditions inform you re: number of participants
  - Interview tally sheet provides stakeholder group
  - Samples provided in the Accreditation Handbook

Documentation & Evidence

- State Consultant begins talking about documentation and evidence at the Year-Out Pre-Visit
- Documentation vs. evidence
- Take three minutes to jot down some pieces of evidence and documentation that you would like to see as a reviewer
- Electronic participants—mail in two items you jotted down to webinar@ctc.ca.gov
- In-person participants—popcorn out items you identified

2-week out team conference call

- Purpose: discover clarifying questions, identify areas of concern, gaps in member knowledge and understanding
- Process: Walk through each of the common standards, followed by each program sampling member and their responsibilities
- Require the use of the appropriate templates—they'll thank you later!

2-week out team conference call

- Remember to verify logistical details for each member (either you or state consultant)
- Note: This is the first in a series of team meetings that ensure communication and coverage of content
- Contact the institution with the questions and specify they are not to be answered until the team arrives for the visit (do not write and submit answers)

Fish Bowl Demonstration

- Cheryl: State Consultant
- Mark: Team Lead
- Katie: Common Standard 2
- Gay: Program Sampling for MS/SS

Listen in while the Team Lead for the College of California's Site Visit checks in with two team members

Debrief the conversation.

Part II: At the Site Visit

What is the Team Lead role in regards to the institution?

- Communicate with the state consultant continuously to stay on the same page
- Act as a liaison with team members, program directors, and institutional personnel
- Monitor and adjust the interview schedule
- Provide a formal Mid-Visit report on the visit status
- Facilitate team deliberations and decision-making

Leading the Team

- Initial team meeting
  1 Set expectations for today's work
  2 Revisit the conference call topics and requests for data.
  3 Review the interview schedule.
  4 Ask for additional concerns or requests
  5 Remind team members of pertinent interview tips
    - Identify as from the CTC, NOT their employer
    - Review the Interview Guidelines (page 15)

Leading the Team (cont.)

- Conduct Team Meetings throughout the visit
  - Constant, open communication within team & to institution
  - Working lunch meetings: what, why, how?
  - Consensus on findings conversation….demo?
- Overseeing Team Member work
  - Meeting time goals
  - Quality of writing
- Looking for bias situation/red flags
- Demonstrate ways to compile findings

Interview responsibilities

- Be an interviewer as needed
  - Deans, Provosts, Presidents, Superintendents
  - Assigned standards or assigned groups (large institutions)
  - The "extras", the "latecomers", "I still need that's"
- Monitor interview schedule
  - Adequate time for interviews to be completed
  - Adequate number of interviewees showing up
  - Needed stakeholder groups are being interviewed
- Schedule additional interviews as needed

Interview Scheduling Tips

- Schedule those who know the most about the programs to be interviewed first
- Try to schedule representatives from key stakeholder groups on the first day (in order to identify gaps)
- Mid-visit report time can be flexible
- Schedule hard-to-get stakeholders on Sunday, if available

Practice Time!

- Interview Tally Sheet (Page 22/Handout 2): Mark the appropriate stakeholder groups to be interviewed with a √. Mark the ones not needed with an X.
- Sample Schedule (Page 23/Handout 2): Cross-check that all stakeholder groups to be interviewed are scheduled. (Use a * if scheduled)

Report Responsibilities #1

Contextual information for the Site Visit report (in tandem with the state consultant)

- Geographic Information
- Institutional/District Information
- Educational Unit Information
- Candidate numbers per program
- Ethnicity information (K-12)

Sample Contextual Section

Use the link below to review the contextual portion of an accreditation report:

https://info.ctc.ca.gov/fmi/xsl/accreditation/accreditation_reports.html

Report Responsibilities #2

- Mid-Visit report
  - Supported by the state consultant
  - Meeting among State Consultant, Team Lead, and institutional representatives of their choice
  - Team Lead, representing the activities of the team, presents the information
  - State Consultant, ensures that the state process is followed and helps make arrangements for team needs

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Mid-Visit Report

- Contents of the Mid-Visit Report
  - Adequate evidence has been acquired except in noted standards
  - Gaps in the team's knowledge
  - Areas where the team is unclear
  - Questions that the team still has
- COC Mid-Visit Report (page 16)

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Fish Bowl Activity

- Watch the Mid-visit report from the College of California’s site visit
  - Dean, School of Education (Katie)
  - Team Lead (Mark)
  - State Consultant (Gay)
- Practice Time (page 18)
  - Write the opening paragraph for the mid-visit report, explaining the purpose, use, and follow up activities of the Mid-Visit Report

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Building Consensus

- Consensus is based on understanding and support for group decisions
- Consensus emerges throughout the visit process
- Every team meeting during a visit provides opportunities to gauge and build consensus
- In reaching consensus, team members must seek to understand each other's perspectives

CTC

Resolving Consensus Issues

- Factors that sometimes distract from reaching consensus include
  - Unclear understanding of actual standards requirements
  - Personal perspectives about how program/unit should implement standards
  - Lack of flexibility in considering other perspectives
- The literal language of the standards defines what the unit must do to meet them

Confirming Findings

- Team decisions on Common Standards must be congruent with decisions on Program Standards
- Team Lead plays a key role in helping members weigh specific findings in relation to broad standard language
- Considerable time may be spent during final deliberations in order to achieve balance and congruence in standards decisions

Accreditation Recommendations

- Accreditation recommendation (and any stipulations) needs to be congruent with team decisions on standards
- "General Guidance for Initial Site Visit Team Recommendations" (page 19) provides a starting point for reaching consensus on accreditation recommendation
- *Accreditation Handbook* provides actual language that defines each accreditation recommendation option

Rationale Statements, Stipulations

- Rationale statements that accompany standards found to be not fully met must
  - Indicate what the standard language requires
  - State the evidence found by the team that does not align with standards requirements
- Stipulations made as part of an Accreditation Recommendation must
  - State the action(s) the institution must take in order to remove the stipulation
  - Indicate the time frame in which action must be taken

Report Responsibilities #3

- Assemble the draft Site Visit Report (work with the state consultant), which is left at the institution
- See a sample by using the following link: https://info.ctc.ca.gov/fmi/xsl/accreditation/accreditation_reports.html

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Report Responsibilities #4

- Help assemble the draft Site Visit Report, which is left at the institution
- Finalize Report for COA (support only)
  - COA Cover sheet (is completed later)
  - Common Standards overview statement
  - Program Standards overview statement
  - Overall Recommendation
  - Chart of credential programs sponsored
  - Team Names
  - Documents Reviewed
  - Interviews Conducted
  - Background, Unit Info, Program Numbers, Site Visit details (work with state consultant)

Writing responsibilities

- Oversee team member report writing
  - Read samples of each members' writing early!
  - Use the state consultant and other team members as a fellow readers/editors
- Write/edit the reports as needed
  - Common Standards Report Template (page 12)
  - Program Report Template (page 11)
  - Contextual section (documents read, interviews held, findings)
- Assemble the draft report that is left with the institution
  - LCD projector could be used to show entire team the draft report
  - Edit for one voice
  - Continuing grammatical edits and factual corrections occur after the visit

Writing responsibilities

- Ensure the report represents the unique characteristics of the institution
- The evidence that was reviewed as well as the standard finding
- Factual information should be written in the report before arriving at the visit; additions reflect evidence received while at the bullet

Exemplary Practices

- New section following the final program report
- Optional to do this
- Document truly exemplary or innovative practices at the institution or in one or more programs

Various and sundry chores

- Oversee that the evaluations are completed
- Support the state consultant in gathering any notes taken by team members
- Aid the state consultant in facilitating check-out details at the hotel
- Support the state consultant in arranging transportation from the final venue to airport, train station, etc.

Conduct the Exit Report

- Confirm the time for the exit report and honor that time
- Verify who is attending
  - Team Members
  - Institution personnel
- Consultant will set stage, but Team Leads have ownership of the team's site visit report
- Leave a draft copy of the report, with directions on how to submit any factual changes


Part III
After the Visit:
Unpacking the Experience

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After the Visit

- The Site Visit Report
  - Review for accuracy, including any factual changes provided by the institutions
  - Present the report to the COA
    - Who does what?
      - Introduction by state consultant
      - Actual report by Team Lead
      - Comments by the institution
      - Questions, discussion, and decision by the COA
    - Reporting out
      - Do NOT read the report
      - 10 minutes or less
      - Be prepared to answer committee members' questions
      - Accentuate the positive before outlining any negative
    - Attendance options: Distance or onsite

Watching a Report Out

- Demo of College of California's report to the COA
  - Gay—state consultant
  - Mark—Team Lead
  - Katie—Dean, representing the COC
  - Teri—COA member
- Take notes on the report presented by the Team Lead

Practice time! (page 21)

Take 3 minutes to reflect on your notes and identify the broad categories you would want to include in any COA report you present

Follow up Emails

- Follow up emails to team members
  - Thank them for their service
  - Inform them of the COA report time and invite them to watch the broadcast
  - Encourage them to complete and submit the site visit evaluation

Noteworthy for Spring, 2014

Budget constraints resulted in

- Smaller teams
- Shorter visits

Tips to help:

--Team Leads responsible for some CS reports

--Interviews with program coordinators may take place electronically BEFORE the visit

--Other?

New for Spring, 2014

- Senate Bill 5 (SB 5)
  - Lifts the Unit Cap
  - Allows 2 Years for program length
- Changes to Preliminary Teacher Preparation
  - Use of Revised TPE – timeline
  - Subject Specific Pedagogy

New for Spring, 2014

- Intern program
- English Language Learner status
  - Transition plans are under review
  - Implementation
- Transitioning programs
  - Reading
  - Preliminary Ed Specialist
- New Programs
  - Education Specialist Clear (most are new, with no completers yet)

New for Spring, 2014

- Administrative Services
  - No changes yet to standards
  - Changes to # years experience
  - Changes to require clear or life credential prior to recommend
  - PSA 13-08 – Clarification of 90 day rule

Parking Lot Questions